

## Getting Started in SIMS

**Step 1:** Click on the SIMS link found at <http://sos.mt.gov/business> and the system will take you to the ePass login page.

**Step 2:** Enter your ePass username and password. If you do not have an ePass account you need to create one. ePass is the State of Montana portal used to establish access to online services. ePass is supported by Montana Interactive. If you experience difficulties establishing your ePass account or have difficulties logging into ePass, please contact Montana Interactive at (888) 449-3468 or (406) 449-3468.

**Step 3: Create your SIMS account.** Once you have successfully logged into ePass, and if it is your first access to the SIMS system, you will be directed to the SIMS account page where you can establish your SIMS account.

Note: For your business, each individual that will be utilizing the SIMS online services must create a SIMS account. If you will be utilizing the "Representatives" function in SIMS you must decide which SIMS account will be the 'Master Account' so that representatives can be assigned to the account. If you are a representative, please retain your SIMS username (ID) and give it to the "Master Account" holder so that he/she may add you to account. Account information cannot be shared. Each organization located at a different physical address must set up a SIMS user account and representative accounts, if needed.

**Step 4:** Establish or **maintain your payment profile.** Click on "Payments/Billing" followed by selecting "Manage Payment Methods" to establish the method you will use to pay for online services. SIMS offers payment types of credit card and e-check. E-check pulls funds from a checking account based on the routing and account number entered. Select the method of payment you want from the "Select Payment Method" drop down list. There is a prompt towards the bottom of the screen where you may enter a name for the payment you set up. This name will appear in the payment drop down list when paying for any items in the shopping cart.

**Step 5: Add or maintain representatives.** The "Representative" function is accessed by clicking on the "Representative" button found on the home SIMS screen. This function allows an organization to add individuals known as Representatives to a Master Account. Payment for any work performed in SIMS by those individuals will be deducted from the payment method defined in the Master Account. Representatives may use the Master Account holder's subscriptions. When adding a Representative to a Master Account, the representative will need to provide his/her SIMS username to the person that manages the Master Account. If you do not have staff within your organization that will be using the SIMS online services you may skip this step.

You are now ready to use the available UCC online services. The following services are available:

- **New Liens Filings:** Allows users to file lien documents and amendments.
- **New Liens Search:** Allows users to download debtor search certificates at a cost per certificate. Users may also download images of lien documents for an additional cost.
- **Filing Templates:** Allows users to establish a template for filing to save on repetition when completing a filing online.
- **In Progress Filings:** Allows users to view filings that are in progress.
- **Filing History:** Allows users to track the work performed in SIMS.
- **Subscriptions:** The services under this tab are billed monthly and consist of the following:
  - **Certified Lien Searches:** Users may perform unlimited debtor search certificates for a minimal fee per month. In addition, the site allows users to download images of lien documents for an additional fee per request.

- **Farm Bill Master List:** Buyers of farm products, commission merchants, and selling agents may search to determine if a security interest exists against specific farm products consisting of livestock, crops and unmanufactured goods. Lenders may choose to sign up for this list to verify their lien against farm products appears on this list.
- **UCC Bulk:** Users may download data stored in our UCC system along with associated images.

Our online help feature is available. Just click the Online Help button for help anytime you need it.

If you encounter issues establishing your SIMS account and/or utilizing the UCC online services, please contact the Secretary of State's office at (406) 444-2468.